



CATHOLIC COMMUNITY
FOUNDATION

Enriching Lives In Northeast Ohio

**INSTRUCTIONS FOR TRANSFER OF STOCK
FROM A DONOR'S BROKERAGE ACCOUNT
DIRECTLY TO THE CATHOLIC CHARITIES BROKERAGE ACCOUNT**

If a donor wishes to transfer shares from a personal brokerage account to the account of the Catholic Charities Corporation, the donor must convey the following information to their broker:

Broker:	Morgan Stanley	
Account Name:	Catholic Charities Corporation	
Account Number:	613-120301-017	
DTC Routing #:	0015	
Contacts:	Cheryl Hartman	Cheryl.L.Hartman@morganstanley.com (717) 519-4948
	Gregory Luscher	Gregory.Luscher@morganstanley.com (717) 519-4945

To ensure prompt processing and acknowledgement of your gift, please call or email

*Madelyn Zone
216-696-6525 x2940
mzone@catholiccommunity.org*

And provide the following information:

- *Name of person or organization donating the stock*
- *Name of Stock*
- *Number of Shares*

Per IRS rules, the value of the gift will be determined as of the date the stock is transferred into the Catholic Charities Corporation's account.

**INSTRUCTIONS FOR TRANSFER
OF A STOCK CERTIFICATE
HELD IN A DONOR'S NAME**

To donate a stock certificate held in your own name, a Stock Power Form and a Security Release Form will be sent for your notarized signature to complete the gift transfer.

Per IRS rules, the value of the gift will be determined as of the notarization date of all properly executed form.